



2016 Performance Appraisal for Maria Suarez

EMPLOYEE INFORMATION

Last Name	Suarez	Division Code	4500
First Name	Maria	Department	NY Met Whse - Day
Division Title	WMI Administrator	Location	NY Metro - Syosset - 345
Manager	John Wilkinson		

RESULTS / PERFORMANCE GOALS (50% of Appraisal)

Describe personal results achieved against Job Expectations / Goals.

Section Comments:

Managers Comments

Maria was given the opportunity to be part of a team that spearheaded the installation of WMI. Many other WMI administrators and other departmental help was sent to Syosset to make the installation smooth. Maria struggled to handle the assistance that was offered to her. She regularly made adjustments into WMI that were in accurate or one sided.

DEMONSTRATED SKILLS (50% of Appraisal)

Appraise how well the following skills were demonstrated. Provide supporting comments and specific examples.

Accountability

Holding self and others accountable for keeping commitments and delivering the best possible performance; Takes full responsibility for own actions and results; Is reliable and can be counted on to keep commitments; Follows up and monitors progress to ensure that things stay on track; Sets clear expectations of self and others.

- Takes full responsibility for overall execution and delivery of critical tasks or projects.
- Holds self and other team members accountable for achieving results.
- Ensures that management isn't surprised by undesirable or unexpected outcomes.
- Takes commitments to team members and direct reports as seriously as commitments to superiors.
- Clearly communicates expectations up front and is careful not to over-commit the team.

Rating

Needs Improvement

Rating

Select One

Comments by John Wilkinson

Maria called out sick multiple times this year. These were not prescheduled AP days and this affected her reliability. It was expected that Maria would take over and control the implementation of WMI but after 2 months her Upstate counter part was still managing 50% of the job. Maria also did not hold herself accountable for achieving the necessary results. During an audit by our outside auditor Maria was absent and one of her subordinates had their counts audited. The counts were not accurate and they needed to be corrected by the IC Manager and the auditor. When Maria was informed of this she insisted that her counter was accurate and should not be disciplined. Maria had no proof of accuracy and still did not want to have her cycle counter disciplined, she did not want to hold the cycle counted accountable.

Communication

Ensuring that communication channels are open and that information and ideas are flowing in all appropriate directions; Shares appropriate information that helps others; Listens to others correctly; Interprets messages from others and responds appropriately; Speaks and writes clearly and effectively; Provides information and messages in a way that produces clarity and impact.

- Tailors the message to multiple audiences and uses different media sources to ensure everyone receives and understands important communications.
- Proactively updates teams on progress and information so that everyone is up-to-date.
- Creates an environment where others feel safe to be open and candid.
- Actively listens to what others are trying to say and probes for understanding of others point of view.
- Consistently, confidently, and clearly communicates constructive feedback to others.

Rating	Rating
Needs Improvement	Select One

Comments by John Wilkinson

Maria has a very difficult time communicating with her cycle counters, warehouse management, and other departments. Maria is combative and others do not feel safe to be open and candid. During the WMI implementation he alienated outside support and made it uncomfortable for warehouse employees and management to ask questions about how to use the new WMI program. Maria argued with subject matter experts and regularly did processes her way instead of following procedures that were taught to her by subject matter experts.

Excellence Orientation

Being results-oriented with a strong drive to accomplish objectives and meet high standards; Shows persistence and tenacity in working towards goals; Pursues goals beyond what is typically expected or expressed; Strives to improve own performance and to have a significant impact on SWS's success; Continuously seeks to enhance the quality and detail of services, products and processes.

- Sets and maintains high performance standards for self and others that support the organization's strategic plan.
- Demonstrates endurance and the ability to lead the team through major obstacles.
- Takes responsibility for the quality of the work delivered by direct reports.
- Collaborates with others to derive metrics that comprise a useful scorecard for tracking progress.
- Champions and integrates new processes, tools, and best practices that can elevate the team's performance.

Rating	Rating
Solid Performer	Select One

Comments by John Wilkinson

Maria strives for excellence and sets high standards for herself and her staff. She champions and integrates new processes and tools that she perceives to be worthy. She struggles to collaborate with others which sometimes results in an inferior process. This was evident when WMI trainers from around the country came to Syosset to help educate Maria on how to properly use WMI

Inspiring Others

Demonstrating pride, enthusiasm and passion that are contagious and motivating to others; Recognizes and celebrates contributions of people at all levels of the organization; Shows pride in work and in the organization; Supports and advocates ideas that are in the best interest of the organization; Facilitates a continuous development culture to deepen staff knowledge and skills on technical areas; Shows a desire and commitment to support the organization.

- Ensures that employees are rewarded and recognized appropriately for their contributions.
- Understands what motivates each individual on the team, and uses that knowledge to reward and reinforce successes.
- Encourages others to share even unpopular beliefs, as long as they are constructive and in the best interest of the organization.
- Is willing to go out on a limb and defend beliefs when he/she truly believes it is in SWS's best interest.
- Helps direct reports feel like they are on a winning team.

Rating	Rating

Needs Improvement

Select One

Comments by John Wilkinson

Maria has struggled to inspire her staff during the WMI implementation. She did not inspire warehouse supervision or management either during the WMI implementation. Her staff as well as supervision avoided asking Maria questions and looked to outside WMI trainers when they had questions. Maria needs to coach and lead her staff with enthusiasm and pride.

Leading Change

Identifying, seizing, and spearheading opportunities to accelerate SWS change; Shows initiative and acts as a catalyst for change; Removes barriers to change, enlists others as champions, and otherwise facilitates progress by demonstrating improved ways of thinking and executing; Is decisive and able to quickly recognize and capitalize on opportunities to improve the status quo; Is willing to "break with the past" in order to forge new ground.

- Steadily leads others through ambiguity and newness of both planned and unexpected changes.
- Obtains and provides resources to implement change initiatives and works to make others feel ownership of the change.
- Raises awareness of important issues and creates a sense of urgency in others for enacting needed changes as quickly as possible.
- Leverages the knowledge and experience of employees who bring fresh ideas to the organization.

Rating

Solid Performer

Rating

Select One

Comments by John Wilkinson

Maria can lead others through ambiguity in times of change. She has no problem breaking from the past and advancing new ideas and technologies.

Organizing & Planning

Establishing priorities, objectives, strategies, action plans and/or resource requirements to complete the task on time and meeting expectations; Prepares in advance and sets objectives; Prioritizes work; Is able to multi-task, uses time wisely; Organizes work to improve efficiencies.

- Prioritizes activities in a manner that optimizes resources and creates team synergy when possible.
- Creates detailed team action and execution plans.
- Organizes and schedules people and tasks effectively.
- Guides team members and helps them learn how to multi-task efficiently.
- Manages projects with limited resources when necessary.
- Follows up on team's plan execution.

Rating

Solid Performer

Rating

Select One

Comments by John Wilkinson

Maria is very organized and plans very well. She's very effective at scheduling her staff and managing the processes that they need to perform on a daily basis.

Strategic Thinking

Demonstrating a big-picture perspective and ability to consider all relevant information when making business decisions; Prioritizes and focuses on those things that will most drive SWS success; Grasps complexities and perceives relationships among problems or issues; Recommends ways to position the organization for long-term success; Analyzes a process and associated business logic and offers recommendations based on analysis.

- Periodically re-evaluates priorities to ensure that the most important matters are getting the right attention.
- Engages and seeks input from colleagues whose functions will be involved or affected by decisions.
- Thinks of several possible explanations or alternatives for a situation, anticipates potential obstacles and develops contingency plans to overcome them.

- Integrates different facts to draw accurate conclusions and make well-thought-out decisions.

Rating	Rating
Solid Performer	Select One

Comments by John Wilkinson

Maria has good analytical skills. She is very confident and thinks of several possible explanations or alternatives for a situation. He periodically re-evaluates priorities to ensure that the most important matters are getting the correct attention. She demonstrated these skills during our July wall to wall inventory. She regularly demonstrated this skill during meetings that prepped for our physical inventories.

Talent Building

Attracting, developing and retaining talented people who are most capable of driving organization results; Accurately assesses the strengths and developmental needs of the team; Provides regular coaching to improve performance; Delegates assignments appropriately to develop employees; Provides regular training and coaching on skills, processes and policies.

- Treats coaching as a central part of management's role and sets aside the time to do it well.
- Regularly observes others and gives accurate, specific, and helpful feedback.
- Offers praise and instruction as close in time as possible to the event, so employees know right away how they have done.
- Objectively and accurately defines key strengths and developmental needs for each team member.
- Removes career growth barriers for team members and encourages career progression.

Rating	Rating
Solid Performer	Select One

Comments by John Wilkinson

Maria teaches her staff new skills and works with them so they are more productive. She builds talent through matter of fact style of teaching. While she builds the talent and makes her staff and others more valuable she does not do it through coaching. She removes growth barriers for her team members educating them on processes and analytical research. She delegates assignments to her staff's strengths and helps them to be more successful. Maria could offer more praise and learn coaching techniques to help improve her staff's productivity.

Teamwork

Working in concert with others and creating group synergy in pursuit of collective goals; Demonstrates open, friendly, accepting and supportive behaviors with team members; Shares information, knowledge and experiences openly and proactively; Displays appreciation for individual talents, differences and abilities of others regardless of cultural or demographic differences; Maintains high levels of enthusiasm and energy under difficult or adverse situations.

- Finds ways to synchronize cross-functional processes and ensure that different teams' objectives are supportive of one another.
- Diffuses conflict among disputing teams and helps build bridges that bind different functions.
- Models respectful, collaborative relationships that cross departmental boundaries and organizational levels.
- Encourages team members to develop relationships throughout the organization and not just within their own functional areas.
- Shows sensitivity to differences when interacting with other functional areas and encourages collaboration.

Rating	Rating
Needs Improvement	Select One

Comments by John Wilkinson

Maria likes to work on her own. She is very capable of sharing information and working well in a group. She does not demonstrate open, friendly, accepting and supportive behaviors with team members. This was very evident during the installation and going live with WMI. Multiple team members were uncomfortable and did not enjoy working with Maria.

OVERALL EMPLOYEE PERFORMANCE EVALUATION

How did the employee support the 2017 overall business? What impact did he/she have on the business?

Overall Form Rating:

2.56/6.0

DEVELOPMENT PLAN

Identify up to 3 development areas to focus on over the next year to improve current job performance. Improvements could focus on: knowledge, skills, abilities, experience, expertise, capabilities or competencies.

Development Action
Communication

Goal Details

Development Need	Communication	Development Action	Work on developing better business relationships with fellow employees. Break down barriers that are real or perceived.
Target Due Date	06/30/2017		

Development Action
Teamwork

Goal Details

Development Need	Teamwork	Development Action	Improve your business related teams and groups. Reduce the amount of working on your own and start involving other departments and teams.
Target Due Date	06/30/2017		

SIGNATURE

Signing and submitting this Performance Review form does not constitute agreement or disagreement of the content. It simply indicates that my manager reviewed and presented me with the content of this form.



2017 Year-End Performance Review for Maria Suarez

EMPLOYEE INFORMATION

Last Name	Suarez	Division Code	4500
First Name	Maria	Department	NY Met Whse - Day
Division Title	WMI Administrator	Location	NY Metro - Syosset - 345
Manager	John Wilkinson		

Employee Achievements (50% of Performance Review)

List 3 - 5 achievements the employee has accomplished throughout the year. What was the impact each achievement made to the overall business and to the company?

Comments on Achievements by John Wilkinson

Maria learned WMI and became the WMI administrator. Maria struggled to follow the rules that she was taught in 2016 when WMI was implemented. It became necessary to put her on a performance improvement plan (PIP). Her lack of proper communication with Inventory Control and myself lead to many aspects of her job falling far behind.

We brought the Upstate WMI admin to help retrain and some improvements occurred. Maria is still struggling to stay on top of all of her work but she is communicating better.

Achievements Evaluation

Manager Evaluation

Does Not Meet Expectations

Demonstration of FAMILY Values (50% of Performance Review)

How did the employee apply the SGWS FAMILY Values throughout the year? What behaviors were demonstrated? Provide specific examples in supporting comments.

Fulfill the potential of our suppliers and customers
 Aspire to excellence
 Mission and Vision driven
 Integrity and inclusiveness are our hallmarks
 Leadership in everything we do
 You are critical to our success

FAMILY Values Evaluation

Manager Evaluation

Mostly Meets Expectations

FAMILY Values Comments

Comments by John Wilkinson

Fulfill- Maria does not consistently achieve the results that her job requires. A more diligent work ethic and better communication with Inventory control would help her consistently achieve results. An Examples of this would be when our INVTRSC bucket reached thousands of cases. The items in this bucket should be reconciled within 48 hours.

Aspire- Maria does take full responsibility for her own actions and results. She is committed to assisting suppliers and customers. Where she struggles is with her colleagues. In her own words "I work better alone", is where she struggles to aspire.

Mission- Maria does not think or act like an owner. She acts more like an hourly employee who wants to only put in their hours and go home. Falling behind in her work is not a big deal to her. Looking at the big picture of how keeping the inventory straight affects everybody from CS, warehouse production, suppliers, sales force does not appear to be a big deal.

Integrity- Maria **does not promote a team environment** as stated before, "I like to work alone". She does manage her team and they appear to follow her lead, but other departments such as accounting IC or warehouse management have no team relationship with her.

Leadership- Maria is **lacking in leadership skills**. She has a **very narrow focus and struggles to communicate effectively**

You- Maria does take action to improve herself but **struggles to understand her weaknesses such as not knowing what she doesn't understand.**

OVERALL EMPLOYEE PERFORMANCE EVALUATION

How did the employee support the 2017 overall business? What impact did he/she have on the business?

Overall Performance Review Evaluation

Does Not Meet Expectations

Suggested Overall Performance Rating

Does Not Meet Expectations

Overall Comments – Please provide a detailed explanation for your final rating.

Comments by John Wilkinson

Maria had a very tough 2016 and was placed on a PIP. While there have been improvements I cannot honestly state that she "Mostly Meets Expectations"